

MONTGOMERY COUNTY GREEN BANK TECHNICAL ASSISTANCE PROGRAM REQUEST FOR QUOTATIONS (“RFQ”)

Responses Due October 31st, 2022, at 5pm ET

Overview: The Montgomery County Green Bank (“Green Bank”) is launching a technical assistance (“TA”) program to help define the business case for energy conservation measures (“ECMs”) on commercial properties in Montgomery County. Specifically, the Green Bank is subsidizing up to 100% of the cost of ASHRAE Level I, Level II, Level III/ Investment Grade Audits, and feasibility analyses designed to inform building improvement plans and encourage property owners to comply with Building Energy Performance Standards (BEPS) requirements.

Only energy audit service providers and qualified contractors that respond to this RFQ are eligible to join the Contractor Pool and receive Green Bank subsidy.

Eligible Property Types: The Green Bank TA program serves commercial entities. Eligible property types include but are not limited to office, industrial, retail, hospitality, common ownership communities, multifamily rental (market rate and affordable), and nonprofit-owned properties such as faith-based and educational institutions.

Scope of Work (“SOW”): The Contractor Pool will be required to provide the following “Required Services on All Projects” and “Additional Services as Needed on Projects”¹:

- **Required Services on All Projects:** Conduct energy performance audits that identify the current property conditions and the potential improvements that could deliver benefits. Audits should follow ASHRAE 211-2018 guidance for Level I, Level II, Level III/Investment Grade Audits, including the following:
 - o Estimate Utility, Federal, State, County, and other incentives available for the proposed measures.
 - o Estimate energy savings and energy cost savings for the improvements over current conditions.
 - o Assess feasibility, cost, and benefits of full property electrification².
 - o Prepare a report containing the analyses conducted.

¹ The level of effort should be commensurate with the degree of sophistication necessary for audit purposes. For example, a preliminary qualitative assessment of electrification feasibility and contractor pricing estimates (as opposed to supplier quotes) would suffice for a Level I audit, whereas more detailed assessments should include but not be limited to identifying fossil fuel-consuming equipment, identifying replacement equipment options, determining new power requirements, determining new electrical demand, and assessing electrical rate impacts.

² Electrification feasibility assessment may fall outside the scope of an ASHRAE audit. However, the Green Bank supports its County and State partners by obtaining and summarizing market feedback and, as such, we seek qualitative, and quantitative, when possible, indications of feasibility for electrification.

- Include an assessment of financial strategies to achieve the recommendations³.
- Participate in a final discussion of the assessment results alongside the Green Bank.
- **Additional Services as Needed on Projects:**
 - Assess the feasibility of, and develop the business case for, renewable energy technologies (e.g., solar photovoltaics, geothermal) and resiliency measures (e.g., battery storage) as appropriate.
 - Document how the county's Benchmarking program and Building Energy Performance Standards ("BEPS") regulations apply to the subject property. Identify to the property owner how to benchmark or comply with further BEPS regulations as appropriate.

Green Bank Subsidy: The Green Bank will subsidize the cost of energy audits performed. Owners of properties located in [Equity Emphasis/Focus Areas](#) ("EEAs") and multifamily property owners serving low- and moderate-income ("LMI") residents will be eligible for an increased subsidy. The Green Bank subsidy will be subject to a maximum amount that will be set upon receipt of sufficient responses to this RFQ. Maximum subsidy amount will be defined for each level of audit and subsidies for additional analyses listed in the SOW will be determined on a case-by-case basis.

The Green Bank estimates supporting 50 audits under this program through June 30, 2023. The program will serve as a mechanism for the Green Bank to determine how to use audits to accelerate projects and promote compliance with the County's BEPS regulations over time.

Response Requirements: Please indicate your interest in participating in the Green Bank TA program Contractor Pool by emailing the following to info@mcgreenbank.org:

- Contact information.
- Qualifications: A description of your capabilities to perform each type of analysis described in the Scope of Work section. Please include bios/resumes for key staff along with certifications that qualify each individual for the type of work they may perform (e.g., CEM, PE). Include at least one example of a recent comprehensive energy performance audit your firm has conducted, and show how you would present the project economics and financing strategies/impacts for the project.
- Pricing: Provide separate quotes for a) the SOW's "Required Services on All Projects" for each of ASHRAE Level I, II, and III with the included items and b) each additional type of analysis described in the "Additional Services as Needed on Projects" section that your firm is qualified to perform and describe the nature of such services. If the "Additional Services as Needed on Projects" are not something you would typically price separately, please indicate that in your pricing narrative.
- Timing:
 - Contractors may submit questions pertaining to this RFQ to info@mcgreenbank.org.
 - Responses are due October 31, 2022, at 5pm ET. Respondents selected will comprise the initial Contractor Pool cohort. The RFQ will be re-released after the pool is selected

³ Green Bank staff will collaborate with the Contractor Pool to provide up-to-date terms of Green Bank financing options.

and subsidy maximums are set; the RFP will then allow for responses to be submitted on a rolling basis.

Process: The following describes the process for selection and undergoing TA projects under the Green Bank TA Program:

1. Green Bank staff will review responses to this RFQ.
2. Upon collection of a minimum number of responses, the Green Bank staff will identify subsidy maximums for each level of audit and determine the order-of-magnitude subsidies for additional analyses listed in the SOW.
3. The Green Bank will notify service providers and contractors of their selection for inclusion in the TA service provider and contractor pool.
4. Service providers and contractors will enter into a contract with the Green Bank that details the following process for undergoing TA projects.
 - Service providers and contractors will 1) generate TA project leads themselves or 2) be invited to support on TA opportunities generated by the Green Bank.
 - A property owner or designee (e.g., property manager or the service provider/contractor) must apply through the Green Bank website portal for the proposed TA project to be accepted.
 - The Green Bank will inform the relevant parties if the application is approved, along with the approved budget.
 - The Green Bank will send an email to the contractor in writing of the approval of the contractor to perform the audit and the budget for that audit.
 - Service providers or contractors will conduct the assessment, audits, and feasibility studies, and collaborate with the Green Bank to integrate Green Bank financing options prepared by Green Bank staff (with insights into how energy savings support financing) with the deliverables provided to property owners by the contractor.
 - The Green Bank will pay contractors for the approved budget upon (i) completion of the work; (ii) delivery of the report; and (iii) a presentation/discussion of the results with the property owner and Green Bank (this final step may be waived at Green Bank staff discretion).